

Consolidated Matrix

Sequence	Category	Definition	Activities	Polytrauma			
				M	A	Input/Output Name and Description	IT System
Pre-Admission	Advance Directives/Health Care Plan of Action (POA)	Discuss process, verify health care power of attorney, verify directives, notarize or witness as appropriate, and submit to medical facility	Discuss process	X	X	SW consult and call for appt (if assessed by non SW)	CPRS,national template
			Verify MPA (medical power of attorney)	X	X	Obtain copy and scan to CPRS,document in progress note	POC for items 4-114 Sheree Gordon and Lisa Perla
			Verify advanced directives	X	X		
			Provide copies to health care team	X	X		
			Complete advanced directives	X	X	Complete SW Advanced Directives note in CPRS	
			Notarize or witness advanced directives	X	X	SW appt	
			Submit form to medical facility	X	X	Have form scanned in CPRS and attached to SW note	
			Monitor progress	X	X		
33		Discuss process, identify	Discuss process	X	X	(O) Tricare Authorization, (O) MMSO [FORM], (O) Fee basis (program) [FORM]	
			Determine need	X		MD orders and consult for VA clinic or fee base if community	
			EXplore resources	X	X	Call for appt VA clinic or community.Obtain billing info for fee base (non VA care) consult	
			Choose appropriate therapy	X		If needed,complete applications for funds from VSO's,Semper Fi Fund, etc. Obtain ROI	
			Determine pay source	X	X	Calls to schedule appts, obtain documentaion, f/u re billing issues.Document weekly to monthly in progress notes. Include in IRCR plan of care	
			Receive service	X			

Pre-Admission	Alternative/ Complementary Therapy	resources, assist with applications and eligibility, and monitor progress	Monitor progress	X			
			Discuss process	X	X	(I) Comprehensive assessment, (I) clinical reminders, (I) care management plans [FORM]	CPRS
			Determine client needs	X	X	Calls to client/caregiver, other CM's, VA liasons, Poly rehab nurse, current providers	
			Identify primary care provider	X	X	Call clinic for appt, inform client	
			Identify case managers for coordination of care	X	X	Schedule appt with CM(LC); Poly MD. Order consults and schedule other team mbrs and specialists as needed.	CMTRA
			Participate in treatment planning and evaluation	X	X	Document in progress notes, IRCR template (notes may be daily)	
			Facilitate transitions	X	X	Team mtg by phone/VTEL	
			Coordinate ongoing case management activities	X	X	Calls, chart reviews, mtgs with client/family /team; Obtain Tricare auths if needed	
			Facilitate communication with care team and providers	X	X	Schedule team and family meetings. Document in progress notes	
Pre-Admission	Clinical Care & Case Management	Plan goals and activities include, at a minimum: discussing the Clinical Care & Case Management process; identifying primary care provider; identifying case managers for coordination of care; determining client needs; evaluate individual programs; participate in treatment planning and evaluation; and monitoring progress in these areas.	Encourage compliance with treatment plan	X	X	Phone or face to face contact depends on plan- daily to weekly; review notes and discuss with team	MyHealthVet-secure messaging
			Monitor progress	X	X	daily to weekly; review notes and discuss with team	
			Discuss process	X	X	current CM/providers	CPRS
			Assess barrier	X	X	Determine need for translator	

Pre-Admission	Communication and Translation	Assess the need for translation or other communication assistance and ensure Recovering Warrior and his/her family have access to necessary communication and translation services	Request service	X	X	Obtain list of translators/assistants and phone calls to schedule for appts. Provide contact info to cleint/family. Document in notes and on IRCR plan	CPRS
			Receive communication and/or translator service	X		phone calls/record review	CPRS
			Monitor progress	X		communication/record review/phone calls	CPRS
Pre-Admission	Non-Clinical Case Management	Plan goals and activities include, at a minimum: discussing the non-clinical case management process, identifying Recovering Warrior program case managers (RCC), determining non-medical care needs, coordinating care, and monitoring progress in each of these areas.	Discuss process	X	X	(I) Comprehensive assessment, (I) clinical reminders, (I) care management plans [FORM]	CPRS
			Identify Wounded Warriors Program (RCC) case managers	X	X	phone contact and document in CPRS	this can be done by OEF/OIF/OND cm in some settings
			Determine needs	X	X	phone contact and document in CPRS	this can be done by OEF/OIF/OND cm in some settings
			Coordinate care	X	X	phone contact and document in CPRS	this can be done by OEF/OIF/OND cm in some settings
			Monitor progress	X	X	phone contact and document in CPRS	this can be done by OEF/OIF/OND cm in some settings
			Discuss process	X	X	phone contact and document in CPRS	this can be done by OEF/OIF/OND cm in some settings
			Determine needs/eligibility	X	X	phone contact and document in CPRS	OEF/OIF/OND cm in some settings
			Arrange family lodging	X	X	phone contact and document in CPRS	this can be done by OEF/OIF/OND cm in some settings
			Facilitate orientation to facility	X	X	phone contact and document in CPRS	OEF/OIF/OND cm in some settings
			Make meal arrangements	X	X	phone contact and document in CPRS	this can be done by OEF/OIF/OND cm in some settings

Pre-Admission	Spouse/Family Orders (Lodging, Travel, Meals, etc.)	Help Service members/Veterans' families obtain the appropriate support during their time in an inpatient (or in some cases, outpatient) treatment facility, before or upon admission.	Arrange local transportation	X	X	phone contact with pt and travel desk/documentation in CPRS	this can be done by OEF/OIF/OND cm in some settings
			Determine family member health issues	X	X	phone contact and document in CPRS	
			Facilitate ITO (Invitational Travel Orders)	X	X	phone contact and document in CPRS	
			Monitor ITO status	X	X	phone contact and document in CPRS	
			Discuss role of NMA (Non-Medical Attendant) and regulations	X	X	acquire needed documentation from medical/clinical staff and share with military liaison	
			Establish NMA orders	X		communication with military liaisons and rehab team to facilitate completion of paperwork	
			Monitor status of NMA orders	X		same as above	
			Discuss VMA (Volunteer Medical Assistant) orders	X	X	same as above	
			Obtain VMA orders	X	X	same as above	
			Monitor progress		X	same as above	
		Assess needs, identify resources, make appropriate referrals,	Discuss process	X	X	(I)-Clinical Reminders, Mental Health ToolboX, Clinical Notes [FORM] (O)-If active duty service member - Tricare Authorization [FORM]	(I)-Clinical Reminders, Mental Health Toolbox, Clinical Notes (CPRS)
			Determine need	X	X	reminders;Consult and call clinic for appt in	CPRS
			Choose appropriate program	X	X	Calls to coordinate appts if both MH and Poly outpt care. Attend team mtgs.Document in IRCR template and progress notes. Calls to obtain info and applications for inpt programs;fax applications;obtain triacre auths if needed	
			Receive treatment	X	X	Obtain travel if needed; Calls to client,provider, review of notes, attend team mtgs	

Post-Admission	Behavioral Health & Substance Abuse	assist with applications and eligibility, and follow up to ensure behavioral health needs are met	Monitor progress		X	Calls to client, provide, review of notes, team mtgs, participate in dc plans, f/u care appts, community programs	
Post-Admission	Hearing/Audiology	Discuss process, assess needs, identify resources, make referrals, assist with applications and eligibility, and follow up to ensure needs are met	Discuss process	X	X	Obtain Tricare auth (form) if active duty	CPRS
			Determine need	X	X	Obtain MD order and consult Audiology	
			Choose appropriate program	X		Obtain appt and if outpt inform client/family. Arrange travel if needed-travel consult	
			Facilitate ongoing care	X		F/u calls to client/clinic, schedule appts and obtain auth as needed	
			Facilitate acquisition of adaptive equipment	X	X	Calls to client/clinic/equipment provider or Prosthetics dept.	
			Determine eligibility	X	X	Document in progress notes and on IRCR	
			Receive service	X	X		
			Monitor progress		X		
			Discuss process		X	education provided to pt/family	CPRS
			Obtain Line of Duty results	X	X	communication with military liaisons and rehab team to facilitate completion of paperwork	CPRS
Post-Admission	Life Insurance (TSGLI, VGLI, FGLI, SDVI, etc.)	Discuss life insurance process; assess needs and eligibility; discuss options; obtain Line of Duty results; complete application; follow up to ensure client has received benefits and has adequate coverage; reassess for additional eligibility; discuss utilization of benefits; monitor progress in each of these areas.	Evaluate insurance options/programs and eligibility	X	X	education and facilitation with military/VBA as needed	CPRS
			Consider SGLI	X	X	providers for completion of SGLI/TSGLI	CPRS
			Consider TSGLI	X	X	obtain needed clinical information from rehab providers for completion of SGLI/TSGLI	CPRS
			Consider VGLI	X	X	providers for completion of SGLI/TSGLI	CPRS
			Consider FGLI	X	X	providers for completion of SGLI/TSGLI	CPRS
			Consider S-DVI when retire, especially if 100% SC	X	X	education provided to pt/family	CPRS
			Complete application	X	X	members/pt/family	CPRS/form
			program	X	X	communication with pt/family	CPRS
			Verify coverage	X	X	needed	CPRS
			Facilitate authorizations	X	X	phone calls/record review	CPRS
			eligibility	X	X	communication with military/VBA/VRE/etc	CPRS
			benefits	X	X	communication pt/family	CPRS
			Monitor progress		X	f/u calls/communication	CPRS

Post-Admission	Non-Medical Bills/Debt	Assess needs, discuss options, identify resources, refer to appropriate debt and/or financial counseling and monitor progress	Discuss process	X	X	counsel and facilitate communication with VBA, etc	CPRS
			Review bills/debt	X	X	contact/communication	CPRS
			Determine responsible party	X	X	contact/communication	CPRS
			waiver	X	X	contact/communication	CPRS
			counseling	X	X	contact/communication	CPRS
			counseling	X	X	contact/communication/counsel pt/family	CPRS
			Identify and implement plan	X	X	counsel pt/family	CPRS
			Assist with client reimbursement request	X	X	contact/communication/counsel pt/family	CPRS
			overpayment	X	X	contact/communication/counsel pt/family	CPRS
			Assist with loan forgiveness	X	X	contact/communication/counsel pt/family	CPRS
			Consider using Accelerated Benefits Option, SGLI	X	X	contact/communication/counsel pt/family	CPRS
			Resolve bill issues	X	X	contact/communication/counsel pt/family	CPRS
			Resolve debt issues	X	X	contact/communication/counsel pt/family	CPRS
			Monitor progress		X	contact/communication/counsel pt/family	CPRS
Post-Admission	Physical Therapy	Discuss process, facilitate appointments, support treatment plan, and monitor progress	progress	X		Obtain Tricare auth/complete form	CPRS
			appointments	X	X	Obtain MD order/consult.Schedule appts	CPRS
			Attend appointments	X	X	needed	CPRS
			treatment plan	X		Check notes for compliance. Document on IRCR	CPRS
Post-Admission	Transition From Military to VA Compensation	Discuss process, identify separation date, educate clients, assist with applications and eligibility, and follow up to confirm receipt					
			Discuss process	X	X	communication/phone calls/F2F	CPRS
			Identify separation date	X	X	Review letter with client.Call VBA,check ebeneifts with them	CPRS
			Link to resources	X	X	Provide contact numbers VBA,VSO reps,VA liasons. Provide resources and assiat with paperwork if need financial assiastance,obtain ROI and contact agencies	CPRS
			Identify month/year of VA compensation receipt	X	X	Assistw ith paperwork to add dependents,direct deposit, clothing allowance.	CPRS
			Discuss VA payment	X	X	communicate F2F/phone calls	CPRS
			Monitor progress		X	f/u contact VBA rep;docuemntaion in progress notes	CPRS
			Discuss process	X	X	Tricare auth if AD,Obtain MD orders and consult	CPRS
33			Assess sensory deficits and/or support needs	X	X	Consult appropriate services-eye,VIST,BROS,low vision;phone calls to providers and client,obtain appt.Document in progress notes	CPRS

Post-Admission	Vision	Discuss process, assess needs, identify resources, make referrals, assist with applications and eligibility, and follow up to ensure needs are met	Identify appropriate resource	X	X	contact/consult/facilitate clinician to clinician communication as needed	CPRS
			Determine eligibility	X	X	communication/record review	CPRS
			Facilitate ongoing care	X	X	communication/record review	CPRS
			Facilitate acquisition of adaptive equipment	X	X	Obtain auth if Tricare.Prosthetics consult and paperwork for approvals if needed. Calls to VIST,BROS,Voc Rehab if involved	CPRS
			Receive service	X	X	Document in progress notes and on IRCR template	CPRS
			Monitor progress		X	communication/record review	CPRS
Stable - Physically	Benefits Counseling	Plan goals and activities include, at a minimum: discussing the Benefits Counseling process; meeting with a VBA counselor to understand eligible benefits; enrolling in eBenefits; meeting with a VHA liaison to establish health care location; and monitoring progress in each of these areas.	Discuss process	X	X	Phone calls to VBA, VSO, Military if applicable, documentation, coordination of referrals, obtain medical records as needed	CPRS
			Meet with VBA counselor to understand eligible benefits	X	X	Coordination of services/education	CPRS
			establish health care location, enrollment and initial appointments	X	X	Coordination of services/education, Phone calls, Authorizations, IRCR, progress documentation	CPRS
			Enrollment in eBenefits	X	X	PREP SWCM completes, Inpt. Polytrauma SW does not	CPRS
			Monitor progress		X	documentation, coordination of care, local templates	CPRS
Stable - Physically	Career Counseling	Includes identification of abilities and appropriate assistance to help direct the Recovering Warrior to a career path or occupation that suits their skills, interests, geographic location, current physical capabilities, and desired financial outcomes.	Discuss process	X	X	documentation; referrals to Voc Rehab	CPRS
			Schedule appointment with career counselor	X	X	Voc. Rehab./VBA/Military, coordination of care,documentation, consults	CPRS
			Schedule appointment with DOL representative	X	X	documentation; referrals as needed	CPRS
			Assess interests and abilities	X	X	SW CM only peripherally involved, not responsible, documentation	CPRS
			Identify appropriate programs	X	X	referrals;documentation	CPRS
			Complete counseling	X	X	SW CM only peripherally involved, not responsible, documentation	CPRS
			Monitor progress		X	Coordination, documentation	CPRS

Stable - Physically	Disability Compensation	Plan goals and activities include, at a minimum: discussing the disability compensation process, providing the RO with additional evidence, linking to disability compensation resources, and monitoring progress in each of these areas.		X	X	coordination of services; referrals; records retrieval; phone calls	CPRS
Stable - Physically	Disability Compensation	Plan goals and activities include, at a minimum: discussing the disability compensation process, providing the RO with additional evidence, linking to disability compensation resources, and	Discuss process	X	X	coordinate; referrals; collaborate with appropriate parties	CPRS
			evidence	X	X	needed	CPRS
			Link to resources	X	X	coordinate; sending records; follow up calls as needed	CPRS
			Monitor progress		X	coordinate; sending records; follow up calls as needed	CPRS
Stable - Physically	Education	Includes identifying educational goals, whether they are degree seeking or technical training, and determining appropriate institutions that can meet the needs of the Recovering Warrior.	Discuss process	X	X	Collaborate with appropriate staff, coordination of care, VBA, Voc. Rehab, Military	CPRS
			Identify appropriate major/field of study	X	X	Collaborate with appropriate staff, coordination of care, VBA, Voc. Rehab, Military	CPRS
			Complete applications	X	X	collaborate and coordinate with Voc Rehab and VBA; monitor and document	CPRS
			Identify educational benefits	X	X	referrals and documentation; monitor	CPRS
			Bill - Active Duty (Chapter 30)	X	X	referrals as needed; documentation; monitor	CPRS
			Consider Post- 9/11 GI Bill (Chapter 33)	X	X	referrals as needed; documentation; monitor	CPRS
			Bill - Selected Reserve (Chapter - 1606)	X	X	referrals as needed; monitor	CPRS
			Educational Assistance Program (REAP/Chapter	X	X	referrals as needed; monitor	CPRS
			Verify program acceptance	X	X	referrals as needed; documentation	CPRS
			Assess progress	X	X	referrals as needed; documentation	CPRS
			Monitor progress		X	referrals as needed; documentation	CPRS
			Discuss process	X	X	referrals and monitor	CPRS
33			Assess interests and abilities and/or education requirements	X	X	referrals and monitor	CPRS
				X	X	referrals and monitor	CPRS

Stable - Physically	Employment	Determining type of employment the Recovering Warrior might qualify for based on their skills, interests, geographic location, current physical capabilities, and desired financial outcomes.	Identify available employment opportunities	X	X	referrals and monitor	CPRS
			Evaluate options to remain on active duty	X	X	referrals and monitor	CPRS
			Determine accommodations	X	X	referrals and monitor	CPRS
			Complete applications	X	X	referrals and monitor	CPRS
			Accept employment	X	X	referrals and monitor	CPRS
			Assess progress	X	X	referrals and monitor	CPRS
			Monitor progress		X	referrals and monitor	CPRS
Stable - Physically	Licensure/ Certification/ Security Clearances	Assist Recovering Warrior where necessary to identify the need, develop the appropriate course of action to meet the need, and fulfill the requirement	Discuss process	X	X	referrals and monitor	CPRS
			licensure	X	X	referrals and monitor	CPRS
			certification	X	X	referrals and monitor	CPRS
			Assess status or need for security clearance	X	X	referrals and monitor	CPRS
			requirements	X	X	referrals and monitor	CPRS
			forms and requested materials	X	X	referrals and monitor	CPRS
			Verify receipt of approval	X	X	referrals and monitor	CPRS
			Monitor progress		X	referrals and monitor	CPRS
Stable - Physically	Vocational Rehabilitation and Employment (VBA, VHA, Compensated Work Therapy, etc.)	Educate the Recovering Warrior on the VBA VR&E and VHA Vocational Rehabilitation programs and connect them with the programs as required	Discuss process	X	X	referrals and monitor	CPRS
			Attend DOD Transition Assistance Program (TAP)	X	X	referrals and monitor	CPRS
			Determine eligibility for VHA and VBA programs	X	X	montior and make referrals as needed	CPRS
			Determine eligibility for Compensated Work Therapy	X	X	montior and make referrals as needed	CPRS
			Meet with VR&E counselor (while still in Active Duty)	X	X	montior and make referrals as needed	CPRS
			Complete assessment testing	X	X	montior and make referrals as needed	CPRS
			Determine educational plan	X	X	montior and make referrals as needed	CPRS
			Implement plan	X	X	montior and make referrals as needed	CPRS
			Monitor progress		X	montior and make referrals as needed	CPRS

Stable - In Rehab	Adaptive Equipment	Plan goals and activities include, at a minimum: discussing the All Adaptive Equipment process, determining need, assisting the client in the equipment acquisition process, providing counseling for payment, confirming vehicle registration, and providing counseling regarding an award letter and future equipment.	Discuss process	X	X	(I/O) Consult or an order	CPRS
			Assess adaptive/assistive equipment needs	X	X	monitor and make referrals as needed	CPRS
			Determine eligibility	X		monitor and make referrals as needed	CPRS
			Assist client in acquisition process as indicated	X	X	monitor and make referrals as needed	CPRS
			Counseling for payment	X	X	monitor and make referrals as needed	CPRS
			Confirm vehicle registration	X	X	monitor and make referrals as needed	CPRS
			Counseling regarding award letter	X	X	(I) Award Notification	CPRS
			Counseling regarding future equipment	X	X	coordinate with VA sites; prosthetics/AT	CPRS
			Complete any necessary applications/authorization	X	X	coordinate with appropriate staff; Utilization review/tricare etc	CPRS
			Obtain relevant equipment	X	X	coordinate with medical providers and prosthetics	CPRS
Stable - In Rehab	Driving Privileges	Assess the need for assistance in obtaining or retaining driving privileges and ensure the Recovering Warrior has access to benefits and services necessary to obtain or retain driving privileges	Verify functionality	X	X	monitor; coordination	CPRS
			Monitor progress		X	monitor; coordination	CPRS
			Discuss process	X	X	monitor	CPRS
			Assess ability to drive	X	X	monitor; referrals/consults	CPRS
			Complete driver's rehab	X	X	monitor	CPRS
			Obtain driver's evaluation	X	X	monitor; provider consults	CPRS
			Obtain license through state DMV	X	X	monitor; referrals as needed with local offices	CPRS
33			Monitor progress	X	X	monitor and documentation	CPRS

Stable - In Rehab	Federal and State Income Tax	Discuss process, identify needs, ensure clients has access to documents and services necessary to meet obligations, and follow up to ensure taxes are completed and appropriately filed	Discuss process	X	X	monitor	CPRS
			Identify tax service	X	X	monitor	CPRS
			Complete and submit tax forms	X	X	monitor	CPRS
			Pay taxes or receive refund	X	X	monitor	CPRS
			Monitor progress		X	monitor	CPRS
Stable - In Rehab	Fiduciary	Assess need for fiduciary, make referral as appropriate, ensure documents are completed and submitted and follow up to ensure the client has a fiduciary appointed	Discuss process	X	X	POA/Guardian/team. Monitor and documentation	CPRS
			Identify need	X	X	team collaboration and referrals as needed	CPRS
			Verify medical documentation	X	X	team collaboration and referrals as needed	CPRS
			Verify RO receipt or documentation	X	X	team collaboration and referrals as needed	CPRS
			Fiduciary appointed	X	X	team collaboration and referrals as needed	CPRS
Stable - In Rehab	Financial Counseling and Plan of Action (POA)	Assess need, discuss POA options for immediate or back-up use (if condition warrants, either temporarily or permanently), identify resources, make appropriate referrals, and follow up to ensure clients have necessary financial counseling	Discuss process	X	X	monitor	CPRS
			Identify counseling service				
				X	X	monitor	CPRS
			Make appointment	X	X	monitor	CPRS
			Develop Financial Plan of Action (POA)	X	X	monitor	CPRS
			Assess progress	X	X	monitor	CPRS
			Verify completion	X	X	monitor	CPRS
			Monitor progress		X	monitor	CPRS
	Health Insurance (SSDI, CHAMPVA, Tricare, etc.)		Discuss process	X	X	social security application, assist/facilitate VBA	CPRS
			Evaluate healthcare coverage and insurance options/programs	X	X	Provide education and information	

Stable - In Rehab		Assess needs, discuss options, assist with applications and eligibility, and follow up to ensure client has adequate health insurance/coverage	Enroll in appropriate program	X	X	Same as above	CPRS
			Verify expected Medicare eligibility date	X	X	communication; contact social security, complete application, submit pertinent medical information	CPRS
			Discuss relationship SSDI/TRICARE/MEDICARE	X	X	Provide education and information, assist with social security application, assist/facilitate VBA claims, communication with military re:	CPRS
			Verify receipt of insurance cards	X	X	Per direct contact with family. Facilitate providing other insurance information to eligibility office	CPRS
			Discuss coordination of benefits	X	X	Provide education and information, assist with social security application, assist/facilitate VBA claims, communication with military re:	CPRS,
			Discuss Medicare B 25 months post SSDI	X	X	Provide education; collaboration with Regional Care Coordinator, AW2 and/or FRC	
			Verify DEERS information	X	X	Per contact with business office, Tricare, and MMSO; communication with liaisons	
			Enroll new family members in DEERS, ASAP	X	X	Per contact with business office, MMSO, military liaison and/or DoD contacts	CPRS
			Refer to enrollment official or web site	X	X	Education; ensure computer access	CPRS
			Consider Tricare, Standard or Prime	X	X	Per contact with Tricare, military liaison and Tricare website	CPRS
			Consider employer based insurance	X	X	Education based on availability	CPRS
			Consider ChampVA	X	X	submitting application; place f/u phone calls.	
			Accept Medicare B at 25 months post SSDI	X	X	Education; contact social security, assist with completing and application; communication with	
			Consider application for Medicaid	X	X	residence; pre-screen for financial eligibility; assist	CPRS
			Enroll in appropriate program	X	X	planning; assist with application	CPRS
			Verify coverage	X	X	Per contact with the specific agency	CPRS
			Facilitate authorizations	X	X	Per contact with Tricare or MMSO	CPRS
			Monitor progress		X	or family	CPRS
33			Discuss process	X	X	initiate HISSA, VBA, and grant applications as soon	CPRS
			Identify needs	X	X	injury and related factors; per team treatment and	CPRS

Stable - In Reha	Housing Adaptation (SAH/SHA/HISA)	Plan goals and activities include, at a minimum: discussing the Housing Adaptation process, discussing options and linking to Housing Adaptation resources, making the appropriate referral, confirming eligibility, tracking the application process, confirming medical documentation submission, confirming receipt of Housing Adaptation benefit, assisting the client in the acquisition process, and monitoring progress in each of these areas.	Link to resources	X	X	resources, liasions, and VBA; partnership with Beyond the Yellow Ribbon, RCC, AW2, other DoD contacts	CPRS
			Confirm eligibility criteria	X	X	Per application requirments	CPRS
			Complete application	X	X	liaison/DoD contacts, SW CM and family members; copies are maintained through the completion of	CPRS
			Track application process	X	X	Ongoing phone contact with agency/resource	CPRS
			Confirm medical documentation submission	X	X	Completed as appropriate and required; obtain ROI prior to release of information	CPRS
			Complete adaptations	X	X	Per contractor/resource/agency	CPRS
			Confirm receipt of benefit	X	X	Per family, resource/community contacts, VBA and other DoD contacts	CPRS
			Assist client in acquisition process as needed	X	X	Ongoing CM services as needed.	
			Monitor progress		X	Ongoing contact per SW CM.	CPRS
Stable - In Reha	Military Combat Specialty Pay & Pay and Allowance Continuation (PAC)	Discuss process, educate clients, assist with paperwork, and follow up to confirm receipt	Discuss process	X	X	manager, command and/or liasion staff	CPRS
			Identify qualifying special pays	X	X	Per direction of DoD	
			Complete paperwork	X	X	Completed per the direction of DoD	CPRS
			Educate on taX benefits related to combat pay status	X	X	Completed in partnership with liaison, DISC, Wounded Warrior staff, AW2, and RCC staff	
			Assess progress	X	X	Ongoing contact by SW CM w/ DoD contacts	
			Confirm receipt	X	X	communication with DoD staff.	CPRS
			Reassess eligibility/continuation of pay	X	X	Ongoing communication with the DoD staff	CPRS
			Monitor progress		X	Ongoing SW CM w/ partnership from DoD	CPRS
			Discuss process	X	X	Education to family; contact with military case manager, command and/or DoD/ liasion staff	CPRS

Stable - In Reha	Military Pay	Plan goals and activities include, at a minimum: discussing the Military Pay process; assisting with pay discrepancies; requesting corrections; confirming correct payments; reassessing continuation of pay; reconcile issues with DFAS; discuss compensation offsets/overlap; Counseling process; meeting with a VBA counselor to understand; and monitoring progress in each of these areas.	Assist with discrepancies	X	X	Ongoing communication with DoD Staff, VBA and any other resources	CPRS
			Request correction	X	X	Facilitated through the military liaisons, military CM, command or other DoD contact	CPRS
			Confirm correct payment	X	X	Completed by DoD, pt/family	CPRS; DFAS
			Reassess continuation of pay	X	X	Communication with DoD staff, facilitated per team and CM direction	CPRS
			Reconcile issues with DFAS	X	X	Completed by DoD; ongoing communication with pt and family and f/u with DoD staff as needed	CPRS
			Discuss compensation offsets/overlap	X	X	Facilitated per the direction of DoD staff/contacts. Ongoing partnership with VBA and regular communication.	
			Monitor progress		X	Ongoing SW CM	CPRS
Stable - In Reha	Prosthetics	Discuss process, determine needs and options (including differences between DoD and VA resources, i.e. VA Prosthetics also covers equipment such as walkers, glucometers, etc.), participate in treatment, follow-up to ensure prosthetics are functioning effectively, and	Discuss process	X	X	members based on progress and identified needs	CPRS
			Assess prosthetics needs	X	X	Directed by treating team	CPRS
			Participate in prosthetic treatment	X	X	partnership with treating providers	CPRS
			Follow-up to ensure prosthetic functionality	X	X	Directed by treating team, ongoing CM and communication with pt/family.	CPRS
			Monitor progress		X	Ongoing CM services, reassessment at local level or appropriate location.	CPRS
Stable - In Reha	Recreation Therapy and Adaptive Sports/Reconditioning	Discuss process, link to resources, facilitate recreation therapy discussions with client, and monitor progress	Discuss process	X	X	treating team members	CPRS
			Link to resources	X	X	(Recreational therapy, social work case	CPRS
			Facilitate recreation therapy discussions with client	X	X	Facilitated through treating team members, specifically recreational therapy.	CPRS
			Monitor progress		X	Ongoing outpatient services.	CPRS, CMTRA
			Discuss process	X	X	Provide education, support and information prior too and upon admission; continue intensive daily contact throughout admission; facilitate discharge planning from the beginning; on-going re-evaluation and assessment	CPRS, CMTRA, IRCR
			Determine need	X	X	Ongoing process of assessment and facilitation; daily contact and collaboration; phone calls; weekly interdisciplinary rounds, family meeting, team meetings, e-mail communication.	CPRS, VISTA

Stable - In Rehab	Rehabilitation	Discuss process, assess needs, identify resources, make referrals, assist with applications and eligibility, and follow up to ensure needs are met	Choose appropriate program	X	X	Ongoing, constant process; collaboration with DoD, families, and other stakeholders. Contact local VA sites; establish contact with transportation resources, community resources; ongoing contact with DoD, Tricare, MMSO;	CPRS: Assessment and d/c templates by social work
			Receive service	X	X	Assure provision of services via direct contact with pt, family, resources; inpatient adjustment of services, behavioral plans, ensure communication; outpt- limit barriers to services, transportation, finances, education; ongoing reassessment of home base needs, disposition planning, financial resources, etc	CPRS
			Monitor progress		X	Ongoing CM services	CPRS
			Discuss process	X	X	treating team members (suggestion of therapy or	CPRS
Stable - In Rehab	Therapy and Service Dogs	Discuss process, assess need, identify resources, make referrals, assist with applications and eligibility, and follow up to ensure needs are met	Determine needs	X	X	Determined by treating team members; pt and family desires and preference	CPRS
			Identify source and apply	X	X	Self directed by pt and family; general resources provided through voluntary services	CPRS
			Agency evaluation	X	X	N/A	N/A
			Complete training	X	X	N/A	N/A
			Register with VA Prosthetics	X	X	Completed through prosthetics once issued a therapy or service dog; assistance by SW CM as needed	CPRS
			Monitor progress		X	SW CM to assist with facilitating the process as needed	CPRS
Pre-Discharge	Auto Grant	Plan goals and activities include, at a minimum: discussing the Auto Grant process, determining eligibility, completing the application, verifying receipt of the auto grant benefit, verifying the operator's license/insurability, and	Discuss process	X	X	Provide education, information and referral to VBA as soon as possible; weekly contacts/meetings, phone calls	CPRS
			Determine eligibility	X	X	Determined by VBA; collaboration; team recommendations; family desires; do application	CPRS
			Complete application	X	X	Completed by pt/family w/ assist of SW CM and partnership with VBA; submit directly to VBA	CPRS

		monitoring progress in each of these areas.	Verify receipt of benefit	X	X	Per ongoing family and VBA contacts	CRPS
			Verify operator's license/insurability	X	X	Per drivers training	CPRS
			Monitor progress		X	Ongoing SW CM	CPRS
Pre-Discharge	Awards and Decorations	Plan goals and activities include, at a minimum: discussing the awards/decorations process, determining the SM/V's status, completing any necessary paperwork, confirming award receipt, and assessing/monitoring progress in each of these areas.	Discuss process	X	X	Assessed by SW upon admission/initial contact with assistance as needed; collaboration with liasions, military CM, military command and/or other DoD contacts	CPRS
			Determine status	X	X	Directed by DoD; collaboration with service organization; obtain ROI as needed	N/A
			Complete necessary paperwork	X	X	Directed by DoD and/or service organization	CPRS
			Assess progress	X	X	Ongoing SW CM w/ partnership from DoD; faciliate award presentation as appropriated and desired by pt, family and DoD/service organization	CPRS
			Confirm receipt	X	X		
			Monitor progress		X	Ongoing SW CM	CPRS
Pre-Discharge	Caregiver	Assess needs, educate Recovering Warrior and caregiver, identify resources, discuss options, make appropriate referrals, assist with applications and eligibility and follow up to ensure caregiver is receiving appropriate benefits and services and is adequately supported	Educate caregiver on resources	X	X	CSC; assist with application process; faciliate contact with local support groups and resources;	CPRS; Caregiver tracking program
			Identify needs	X	X	Identify needs through assesement, home visits, care coordination, team feedback and input, family	CPRS
			Determine resources currently being utilized	X	X	Completed through assessment process and ongoing reassessment; ongoing CM	CPRS
			Determine additional assistance requirements	X	X	Determed through discharge planning process; team assessment; treatment recommendations	CPRS
			Identify availability of services	X	X	Connect with home health agency, HBPC, home maker resources, support groups, caregiver programming; educate family on respite care and services	CPRS
			Determine VA Caregiver Stipend	X	X	Per policy and direction of CSC; ongoing collaboration with CSC	CPRS; Caregiver tracking program
			Link caregiver to resources	X	X	Ongoing faciliation through SW and RN CM and treating team members	CPRS

			Assist caregiver in establishing a self-care routine	X	X	Provide ongoing education and support; offer respite care; facilitate accessing respite services; provide DVBIC resources; provide family support services	CPRS
			Assist caregiver in managing caregiver stress	X	X	Ongoing family support services; ongoing CM services; outpatient care; CSC; family psychology/therapy support; facilitate accessing resources	CPRS; Caregiver tracking program
			Receive family support	X	X	Assess access and availability	CPRS
			Monitor progress		X	CSC, team members and those locally involved in process.	CPRS
Pre-Discharge	Clothing Allowance	Plan goals and activities include, at a minimum: discussing the Clothing Allowance process, determining eligibility, completing the application, receiving the clothing allowance benefit, and monitoring progress in each of these areas.	Discuss process	X	X		CPRS
			Determine eligibility	X	X	Per prosthetics policy; assist with application and submit to prosthetics	CPRS
			Complete application	X	X	Complete in partnership with pt/family/caregiver	CPRS
			Receive benefit	X	X	f/u with family	CPRS
			Monitor progress		X	Ongoing SW CM	CPRS
Pre-Discharge	Community Re-integration (NGO/VSO support etc.)	Plan goals and activities include, at a minimum: discussing the Community Reintegration process, determining needs, exploring available support options, determining eligibility, receiving support services, and monitoring progress in each of these areas.	Discuss process	X	X	Introduced upon admission; RT meets as an active part of the care team (inpt and outpt); referral for services as appropriate.	CPRS
			Determine need and eligibility	X	X	Per team assessment	CPRS
			Explore re-integration resources and programs	X	X	Ongoing provision of services by RT; referral to RT as appropriate; co-treatment and collaboration	CPRS
			Receive service	X	X	Monitor and confirm	CPRS
			Monitor progress		X	Ongoing SW CM	CPRS
Pre-Discharge	Continue on Active Duty or Active Reserve (COAD/COAR)	Plan goals and activities include, at a minimum: discussing the COAD/COAR process, determining the SM/V's status, completing any necessary paperwork, confirming COAD/COAR receipt, and monitoring progress in each of these areas.	Discuss process	X			
			Determine status	X			
			Complete necessary paperwork	X			
			Confirm receipt	X			
			Monitor progress		X	determine if this process occurred.	
			Discuss process	X	X	receiving dental services	instances below

Pre-Discharge	Dental Coverage	Discuss options, identify resources, select provider, facilitate appointments, and follow up to ensure client has appropriate dental coverage	Evaluate dental insurance programs	X	X	locate dental resources/providers	
			Choose provider and enroll	X	X	providers	
			Facilitate scheduling dental appointments	X	X	Either can provider for patient to schedule first appointment, or assist patient in calling provider	
			Receive service	X	X	Insure patient able to attend first appointment	
			Monitor progress		X	insure care is being provided	
Pre-Discharge	Dependent Care	Assess needs, discuss options, make appropriate referrals, assist with applications and eligibility, and follow up to ensure dependent care needs are being met	Discuss process	X	X	Discuss with patient and family the process for receiving dependent care.	
			Determine needs	X	X	represented by patient's dependents	
			Arrange assistance	X	X	Discuss with military liaison the branch specific dependent care benefits (
			Obtain child care subsidies	X	X		
			Identify elder care support	X	X	Depending on the elder care needs, explore community resources including county home	
			Identify appropriate school and register child	X	X	their specific wishes regards to child's educational setting. Assist with gathering needed documentation for enrollment.	
			children (i.e. children taken out of school IT System to be at bed side)	X	X	their specific wishes regards to child's counselling needs. Provide counselling support through VA	
			Monitor progress		X	providers to ensure services are being delivered	
			progress	X			
Pre-Discharge	DES-JAG (Judge Advocate General) Consultation	Plan goals and activities include, at a minimum: discussing the DES-JAG process, reviewing/advising on the MEB pack and subsequent results, preparing and appearing for	packet	X			
			results	X			
Pre-Discharge	Emergency and Disaster Planning	Discuss emergency and disaster planning with Recovering Warrior. Ensure the Recovering Warrior has the necessary emergency and disaster plans in place including, but not limited to, generators, emergency phone numbers and safe	formal PEB	X			
			Discuss process	X	X	emergency/disaster plan when they have returned home.	
			Discuss household dangers and other emergency supplies	X	X	Include in discussion	
			Determine safe meeting place for each disaster and meeting place if necessary	X	X	Include in discussion	
			Identify and list emergency telephone numbers	X	X	Include in discussion	
			Store important papers in a fireproof container	X	X	Include in discussion	
			CPR class	X	X	Include in discussion	
			Emergency plan revision	X	X	Include in discussion	

		phone numbers and care meeting place for family	Monitor progress		X		
Pre-Discharge	Family Medical Leave Act	Educate clients about the law, eXplain eligibility, provide appropriate applications, assist with applications, and follow up to ensure appropriate approvals are received	Discuss process	X	X	Discuss with patient and family and provide education regarding Family Leave	
			Determine eligibility	X	X	Assist family to discuss with employer any Family Leave eligibility issues	
			Complete requirements	X	X		
			Submit application	X	X	Provide any assistance needed to family	
			Obtain approval for leave	X	X	Provide any assistance needed to family regarding employer granting leave	
			Monitor progress	X	X		
Pre-Discharge	Home Care Services	Assess need for home care services, refer Recovering Warrior to appropriate government or nongovernment home care services and follow up to ensure delivery and adequacy of home care services	Discuss process	X	X	services provided	
			Determine need	X	X	SLP, Neuro Psych, SW) determine the appropriate	
			EXplore service options	X	X	Support	
			Discuss eligibility with program personnel	X	X	Phone conversations with representatives of above programs	
			Submit referral for programs	X	X	Complete required paperwork and submit	
			Receive service	X			
			Monitor progress		X	are being delivered	
Pre-Discharge	Homemaker and Home Health Aide (HHA) Services	Assess need for homemaker and HHA services, refer Recovering Warrior to appropriate government or nongovernment homemaker and HHA services and follow up to ensure delivery and adequacy of homemaker and HHA services	Discuss process	X	X	services provided	
			Identify need	X	X	SLP, Neuro Psych, SW) determine the appropriate	
			Determine eligibility	X	X	Support	
			Refer to appropriate vendor	X	X	programs	
			Receive service	X	X		
			Monitor progress		X	are being delivered	
Pre-Discharge	Housing (Permanent)	Assess the need for permanent housing, discuss options, make appropriate referral, assist with applications and eligibility, and follow up to ensure need has been met	Discuss process	X	X	Discuss with patient and family the housing needs	
			Evaluate options	X	X	manager	
			Apply for base/post housing	X	X	MTF	
			financing	X	X	modification grants, charitable organizations	
			Submit VA Request for a Certificate of Eligibility	X	X		
			Consider VMLI	X	X		
			Complete loan application	X	X		
			Receive funding	X	X		
			Close housing contract	X	X		
			Move household goods	X	X		

Pre-Discharge	Housing (Temporary)	Assess the need for temporary housing, discuss options, make appropriate referral, assist with applications and eligibility, and follow up to ensure need has been met	Discuss process	X	X	Discuss with patient and family the housing needs	
			Identify needs	X	X	manager	
			Determine options	X	X	MTF	
			reservations/arrangements	X	X	organizations	
			housing	X	X		
			Monitor progress		X		
Pre-Discharge	Independent Living	Assess the need for independent living services, discuss options, make appropriate referral, assist with applications and eligibility, and follow up to ensure need has been met	Discuss process	X	X	Discuss process with Interdisciplinary Team, patient, and family to determine independent living needs	
			Discuss eligibility with program personnel	X	X	consult with admissions coordinators of various independent living facilities (Centre of Neuro Skills, Learning Services, Touchstone, Casa Colina)	
			Facilitate evaluation for program	X	X		
			program	X	X		
			Monitor progress		X		
Pre-Discharge	Line of Duty	Plan goals and activities include, at a minimum: discussing the line of duty process, assessing the SM/V's status, identifying legal representation, tracking the appeals process, confirming final line of duty/appeal status, and monitoring progress in each of these areas.	Discuss process	X	X	Provide education to patient and family that military liaison is the point of contact for all line of duty issues	
			Assess status	X	X		
			Identify legal representation	X	X		
			Track appeals process	X	X		
			Confirm final status	X	X		
			Monitor progress		X	Discuss with military liaison and patient if this process has occurred.	
Pre-Discharge	Military and Personal Belongings	Plan goals and activities include, at a minimum: discussing the	Discuss process	X	X	point of contact for these processes. Discuss with	
			Current ID Card in place	X	X		

		military/personal belongings process, ensuring a current ID card is in place, identifying the location of belongings, identifying military officials to assist, receiving the belongings, accounting for any military items, identifying and/or submitting claims for lost items, and paying claims.	belongings	X	X		
			assist	X	X		
			Receive belongings	X	X		
			Accounted for military items	X	X		
			Identify lost items	X	X		
			Submit claim for lost items	X	X		
			Claims paid	X	X		
			Discuss process	X	X		
			Determine needs	X	X		
			Identify resources	X	X		
			Submit request	X	X		
			Receive food items	X	X		
Pre-Discharge	Nutrition	Assess need for assistance, identify resources, assist with application and eligibility, and follow up to ensure services have been received and nutritional needs continue to be met	Monitor progress		X		
			Discuss process	X	X	respite services	
			Determine need	X	X		
			request dates	X	X		
			Submit application	X	X	Assist with application for VA respite care	
			Receive respite care	X	X		
Pre-Discharge	Respite Care	Assess needs, identify resources, select dates, make applications, and follow up to ensure appropriate respite care is provided	Monitor progress		X		
Pre-Discharge	Self-Care		Discuss process	X	X	element of self care.	
			interests	X	X	Include in discussion	
			Evaluate social support and relationships	X	X	Include in discussion	
			Identify available resources	X	X	Include in discussion	
			EXplore economic and other potential opportunities	X	X	Include in discussion	
			Develop plan	X	X	Include in discussion	
			activities	X	X		
			Monitor progress		X		
Pre-Discharge	Service Member Orders		Discuss process	X	X	this activity.	Patty Jackson and Lisa Perla
			Determine duty status (full/limited)	X	X	Update CPRS re: military status as this issue evolves.	
			Determine separation date	X	X		

		Plan goals and activities include, at a minimum: discussing the Orders/Service member process, determining duty status (full/limited), determining a separation date and separation itself, eXtending release from active duty date, processing leave/PCS/TDY-TAD paperwork, reserving orders, making line of duty determinations, and monitoring progress in each of these areas.	Determine separation	X	X	question if this category should be A vs M ?	
			EXtend release from active duty date	X	X		
			Process leave	X	X		
			Process PCS paperwork	X	X		
			Process TDY/TAD paperwork	X	X		
			Reserve orders	X	X		
			Line of duty determinations		X		
			Monitor progress	X	X		
Pre-Discharge	Social Security Benefits	Assess needs, identify resources, assist with applications and eligibility, and follow up to confirm receipt	Discuss process	X	X	VA CM communicates w/ military command related	
			Evaluate eligibility	X	X	If appropriate initiate Social Security benefit process	
			Complete application	X	X	Educate re: different options	
			Verify receipt	X	X	SS website: http://www.socialsecurity.gov/	
			Medicare/TRICARE interaction	X	X	Assist w/ application completion	
			File appeal		X		
			Monitor progress	X	X	SCAADL is military benefit.	
33	Special Compensation	Discuss process, assess needs and eligibility, assist with paper					
			Discuss process	X	X	Catastrophic Disability benefit on VA side.	
			Determine need/eligibility	X	X	Determine status of military application	
			Apply for benefits	X	X	Determine status of VA application	
			Confirm receipt	X	X		

Pre-Discharge	for Assistance with Activities of Daily Living (SCAADL)	work and applications, and follow-up to confirm receipt or continued need	eligibility/continuation of		X		
			Monitor progress	X	X		
	Special VA Programs		Discuss process	X	X		
			Determine need/eligibility	X	X		
			Primary Care	X	X	are site specific.	
			Homes	X	X		
			Intensive Case Management Program (MHICM)	X	X	CIM evaluates each potential referral to specialized program based on local availability	
			Veterans with Traumatic Brain Injury Pilot Program (AL-TBI)	X	X		
		Plan goals and activities include, at a minimum, counseling for: Compensated Work Therapy; Home Based Primary Care; Medical Foster Homes; MHICM; TBI/AL Project; and Veteran Directed Home and Community Based Program.	Home and Community Based Program	X	X		
			application/paperwork (as necessary)	X	X		
			programs	X	X		
			need		X		
Pre-Discharge			Monitor progress	X	X		
			Discuss process	X	X		
			Determine need	X	X	contacts	
			Identify resources	X	X	involve TPA at local VA site if indicated.	
			Complete requirements	X			
			Utilize transportation	X			
			Receive VA reimbursement	X			
			Handicap tag registration		X		
Pre-Discharge	Transportation	Assess needs, discuss options, identify resources, assist with applications and eligibility, assist with reimbursements as appropriate and follow up to ensure transportation needs continue to be met	Monitor progress	X	X	VJO representative to be sure all issues are	
			Discuss process	X	X		
			Secure legal representative	X	X		
			Attend court appointed date with representative	X	X		
			Facilitate Transfer to Veteran's Court	X	X		
		Plan goals and activities include,					

Post-Discharge	Civilian Court	at a minimum: discussing the civilian court process, securing a legal representative for the SM/Veteran, attending the court appointed date with the legal representative, facilitating the SM/V's transfer to Veteran's Court, completing any court-mandated treatment or incarceration, and monitoring progress in each of these areas.	Complete court mandated treatment	X	X		
			Complete court mandated incarceration		X		
			Monitor progress	X	X	Property conservatorship is not part of VA CM role	
Post-Discharge	Conservatorship (Property)	Plan goals and activities include, at a minimum: discussing the conservatorship process, determining the needs, acquiring the appropriate legal services, petitioning the court, and providing service in place, and	progress	X	X	Question if should be M vs A function?	
			Determine need	X	X		
			Acquire legal services	X	X		
			Petition court	X	X		
			Service in place	X	X		
			Discuss process and monitor progress	X	X		
			Educate on the purpose and process	X	X		
			Facilitate MEB referral	X	X		
			Identify PEBLO	X	X	communicate and coordinate w/ military liaison to complete MEB and PEB process	
			Confirm health record submission	X	X		
			Submit Line of Duty results	X	X		
			Confirm narrative summary (NARSUM) completion	X	X		
			Attend appointments	X	X		
		Plan goals and activities include, at a minimum: discussing the military disability evaluation process and educating the SM/V on its purpose, facilitating the					

Post-Discharge	Disability Evaluation	<p>On the purpose, reviewing the MEB referral and reviewing MEB results, identifying the PEBLO, confirming health record submission, submitting line of duty results, confirming narrative summary (NARSUM) completion and receiving/reviewing once complete, ensuring MD signs the NARSUM health with specialty addendums, returning to active duty (if applicable), confirming MEB results are forwarded to PEB, facilitating JAG consultation, appealing and/or accepting the PEB recommendations, meeting with a Military Service Coordinator (MSC), completing the VA Compensation Disability Claim, attending appointments and C&P eXaminations, and monitoring progress in each of these areas.</p>	MD signs Narrative Summary health with specialty addendums	X	X		
			Return to active duty	X	X		
			Receive and review NARSUM	X	X		
			Review MEB results	X	X		
			Confirm MEB results forwarded to PEB	X	X		
			Facilitate JAG consultation	X	X		
			Appeal PEB recommendations	X	X		
			Accept PEB recommendations	X	X	Assure vet is utilizing service rep for completion of VA comp and pen process	
			Meet with Military Service Coordinator (MSC)	X	X		
			Complete VA Compensation Disability Claim	X	X	? If this is appropriate. CM can assure vet/SM is aware of C&P appts, has transportation, and knows location, etc.	
			Attend all C & P eXaminations		X		
			Monitor progress	X	X	Like to be aware of family court issue and can offer services / support while in family court process.	

Post-Discharge	Family Court	Plan goals and activities include, at a minimum: discussing the family court process, determining the needs, assisting in legal resource or pro-bono service identification, obtaining legal representation, and monitoring progress in each of these areas.	Discuss process	X	X	VA CM cannot become actively involved in family court issues.	
			Determine need	X	X		
			Assist in legal resource identification	X	X		
			Assist in pro-bono service identification	X	X		
			Obtain legal representation		X		
			Monitor progress	X	X		
Post-Discharge	Guardianship/Power of Attorney (POA)	Plan goals and activities include, at a minimum: discussing the guardianship/POA process; determining the need; discussing various alternatives for legal protection in the appropriate jurisdiction; assessing the presence of appropriate documents; facilitating the location of legal assistance and communication with the appropriate legal personnel; confirming the court filing; discussing ongoing guardian responsibilities; confirming that audits were filed; discussing revocation when indicated; acquiring legal services; choosing a guardian/POA; petitioning the court; appointing a guardian/POA; and monitoring progress in each of these areas.	Discuss process	X	X	VA staff not allowed to accompany vet to court.	
			Discuss various alternatives for legal protection in appropriate jurisdiction	X	X	can obtain 2 providers to document need.	
			Assess presence of appropriate documents	X	X	Set up for evaluation to determine competency	
			Facilitate location of legal assistance	X	X	Discuss w/ vet and family process to file for guardianship	
			Facilitate communication with appropriate legal personnel	X	X	Obtain needed forms from local county court.	
			Confirm court filing	X	X	Assist to complete forms	
			Discuss ongoing guardian responsibilities	X	X	If needed, can call APS to identify state guardian	
			Confirm audits filed	X	X	contact VA legal re : court petition to appear	
			Discuss revocation when indicated	X	X	Monitor thru process	
			Determine need	X	X	copies of official court documents in CPRS	
			Acquire legal services	X	X		
			Choose guardian	X	X		
			Petition court	X	X		
			Appointment of guardian		X		
			Monitor progress	X	X	Discuss w/ vet/SM and offer support.	
Post-Discharge	Military Court	Plan goals and activities include, at a minimum: discussing the military court process, identifying a JAG representative, attending a court-appointed date with a representative, completing any court-mandated treatment or incarceration, and monitoring progress in each of these areas.	Discuss process	X	X	No other active role for VA CM.	
			Identify JAG representative	X	X	? If should be M vs A?	
			Attend court appointed date with representative	X	X		
			Complete court mandated treatment	X	X	able to access VA care.	
			Complete court mandated incarceration		X		
			Monitor progress	X	X		

Post-Discharge	Non-Medical Retirement & Separation	Plan goals and activities include, at a minimum: discussing the non-clinical retirement/separation requirements process, determining the date of retirement, submitting the completed paperwork, attending appointments and transition classes, confirming TRICARE eligibility and enrollment, selecting insurance, receiving retirement paperwork (DD214), applying for combat-related special compensation (CCMT C), determining survivor benefits plan (SBP), determining transfer of education entitlement, and monitoring progress in each of these areas.	Discuss process	X	X	Comprehensive Assessments, LC Checklist	CPRS & CMTRA Notes, POA's as needed, LC
			Determine date of retirement/separation	X	X	Phone calls with PEBLO, Military CM's, Command	CPRS & CMTRA Notes, LC Checklist
			Submit completed paperwork	X	X	Phone calls with PEBLO, Military CM's, RCC's, Command Staff, VBA	CPRS & CMTRA Notes, LC Checklist
			Attend appointments and transition classes	X	X	Phone calls to determine if there are appointments	CPRS & CMTRA, LC Checklist, Travel Consults
			Confirm TRICARE eligibility	X	X	Phone calls with PEBLO, Military CM's, RCC's, Tricare/MMSO, VBA	CPRS & CMTRA Notes, LC Checklist
			Confirm TRICARE enrollment	X	X	Phone calls with PEBLO, Military CM's, RCC's, Tricare/MMSO, VBA	CPRS & CMTRA Notes, LC Checklist
			Select insurance	X	X	Primarily Military function, VA CM coordinates meetings etc., if patient unable to return to a MTF	CPRS & CMTRA, LC Checklist, Travel Consults
			Receive retirement/separation paperwork (DD214)	X	X	Phone calls with PEBLO, Military CM's, RCC's, Tricare/MMSO, VBA	CPRS & CMTRA Notes, LC Checklist
			Apply for Combat-Related Special Compensation (CRSC)	X	X	form and coordinate with Military to obtain information or provide necessary VA documentation	CPRS & CMTRA Notes, LC Checklist
			Determine SBP (Survivor Benefits Plan) and submit paperwork	X	X	VA CM will assist with completing & submitting the form and coordinate with Military to obtain information or provide necessary VA documentation	CPRS & CMTRA Notes, LC Checklist
			Determine transfer of education entitlement	X	X	Primarily Military function, VA CM coordinates meetings etc., if patient unable to return to a MTF	CPRS & CMTRA Notes, LC Checklist
			Monitor progress		X	Case Manager monitors all activities through completion or transfer of care	CPRS & CMTRA Notes, LC Checklist
			Discuss process	X	X	Comprehensive Assessments, LC Checklist	CPRS & CMTRA Notes, LC Checklist
			Determine eligibility date	X	X	Primarily Military function, VA CM coordinates meetings etc., if patient unable to return to a MTF	CPRS & CMTRA Notes, LC Checklist

Post-Discharge	Promotions	Plan goals and activities include, at a minimum: discussing the promotions process, determining an eligibility date, completing requirements, determining eligibility for meritorious promotion, promoting SM/V with a formal presentation, and monitoring progress in each of these areas.	Complete requirements	X	X	Primarily Military function, VA CM coordinates meetings etc., if patient unable to return to a MTF	CPRS & CMTRA Notes, LC Checklist
			Determine eligibility for meritorious promotion	X	X	Primarily Military function, VA CM coordinates meetings etc., if patient unable to return to a MTF	CPRS & CMTRA Notes, LC Checklist
			Promote with formal presentation	X	X	Primarily Military function, VA CM coordinates meetings etc., if patient unable to return to a MTF , CM collaborates with VA PAO and leadership	CPRS & CMTRA Notes, LC Checklist
			Monitor progress	X	X	Case Manager monitors all activities through completion or transfer of care	CPRS & CMTRA Notes, LC Checklist
Post-Discharge	Property Taxes	Discuss process, identify needs, ensure client has access to documents and services necessary to complete tax payment, and follow up to ensure completion	Discuss process	X	X	Comprehensive Assessments, LC Checklist	CPRS & CMTRA Notes, LC Checklist
			Identify property ownership/location	X	X	Phone calls, linking to appropriate resource to assist	CPRS & CMTRA Notes, LC Checklist
			Identify state requirements	X	X	Phone calls, linking to appropriate resource to assist	CPRS & CMTRA Notes, LC Checklist
			Facilitate submission of paperwork	X	X	assist, assist with notary as needed	Checklist
			Confirm tax record change	X	X	assist	Checklist
			Monitor progress		X	completion or transfer of care	Checklist
Post-Discharge	Reserve/Guard (Transition Assistance Advisors, etc.)	Plan goals and activities include, at a minimum: discussing the Reserve/Guard process, identifying Reserve/Guard issues, establishing communication with a Reserve/Guard advocate, managing Reserve orders, making line of duty determinations, facilitating communication with TRICARE Reserve/Guard Advocate, and	Discuss process	X	X	Comprehensive Assessments, LC Checklist	Checklist
			Identify Reserve/Guard Issues	X	X	Primarily Military function, VA CM coordinates meetings etc., if patient unable to return to a MTF	CPRS & CMTRA Notes, LC Checklist
			Obtain support from Transition Assistance Advisors (TAA)	X	X	Phone call to TAA, AW2 or similar resource, link to appropriate TAA, coordinate phone calls, meetings, faxes to share, assist with notarizing materials as needed	CPRS & CMTRA Notes, LC Checklist
			Establish communication with Guard/Reserve Advocate	X	X	Phone calls to appropriate advocate or similar resource, link to appropriate TAA, coordinate phone calls, meetings, faxes to share, assist with notarizing materials as needed	CPRS & CMTRA Notes, LC Checklist
			Reserve orders	X	X	Primarily Military function, VA CM coordinates meetings etc., if patient unable to return to a MTF	CPRS & CMTRA Notes, LC Checklist

		monitoring progress in each of these areas.	Line of duty determinations	X	X	Primarily Military function, VA CM coordinates meetings etc., if patient unable to return to a MTF	CPRS & CMTRA Notes, LC Checklist
			Facilitate communication with Tricare Reserve/Guard Advocate	X	X	Phone calls to appropriate advocate or similar resource, link to appropriate TAA, coordinate phone calls, meetings, faxes to share, assist with notarizing materials as needed	CPRS & CMTRA Notes, LC Checklist
			Monitor progress		X	Case Manager monitors all activities through completion or transfer of care	CPRS & CMTRA Notes, LC Checklist
Post-Discharge	Retreats	Plan goals and activities include, at a minimum: discussing the retreats process, exploring retreat options with community organizations, completing the application, attending retreats, and monitoring progress in each of these areas.	Discuss process	X	X	Comprehensive Assessments, LC Checklist	CPRS & CMTRA Notes, LC Checklist
			Explore retreat options with community organizations	X	X	Meeting with Recreation Therapist, linking to community organizations, researching online for these opportunities	CPRS & CMTRA Notes, LC Checklist
			Complete application	X	X	Phone calls, faxing/emailing of application, assisting with completing application & returning all information, obtaining POAs, releases of information, notarizing	CPRS & CMTRA Notes, LC Checklist
			Attend retreat	X	X	Phone calls, faxing/emailing of application, assisting with completing application & returning all information, obtaining POAs, releases of information, notarizing, linking to transportation resources	CPRS & CMTRA Notes, LC Checklist
			Monitor progress		X	Case Manager monitors all activities through completion or transfer of care	CPRS & CMTRA Notes, LC Checklist
		Plan goals and activities include, at a minimum: discussing the Veteran's Court process, identifying a legal representative, coordinating with VA for a jail	Discuss process	X	X	Comprehensive Assessments, LC Checklist	CPRS & CMTRA Notes, LC Checklist
			Identify legal representative	X	X	Researching and linking to resources, assisting with completing POA's, consents to exchange information, notary's as needed	CPRS & CMTRA Notes, LC Checklist
			Coordinate with VA for jail representative	X	X	Researching and linking to resources, assisting with completing POA's, consents to exchange information, notary's as needed, linking to VA's VJO or Prison representative	CPRS & CMTRA Notes, LC Checklist

Post-Discharge	Veteran's Court	representative, attending a court appointed date with a representative, completing any court-mandated treatment in lieu of incarceration, and monitoring progress in each of these areas	Attend court appointed date with representative	X	X	Researching and linking to resources, assisting with completing POA's, consents to exchange information, notary's as needed, linking to VA's VJO or Prison representative	CPRS & CMTRA Notes, LC Checklist
			Complete court mandated treatment in lieu of incarceration	X	X	Meet to discuss progress and compliance, link to appropriate programs ie. Substance abuse treatment, PTSD treatment, Anger management. Link to community resources as needed	CPRS & CMTRA Notes, LC Checklist, request consults for MH, SA, PTSD services etc.
			Monitor progress		X	Case Manager monitors all activities through completion or transfer of care	CPRS & CMTRA Notes, LC Checklist
Recurrent	Chaplain/Religious Services	Plan goals and activities include, at a minimum: discussing the Chaplain/Religious Services process, determining a personal reference, eXploring available resources, identifying special needs, receiving services, and monitoring progress in each of these areas.	Discuss process	X	X	Comprehensive Assessments, LC Checklist	CPRS & CMTRA Notes, LC Checklist
			Determine personal preference	X	X	Ongoing assessments, meeting with patient, exploring patient's views link to VA Chaplains or community resources	CPRS & CMTRA Notes, LC Checklist, Chaplain consult
			EXplore resources	X	X	Research online, meet with Chaplain, discuss patient's needs	CPRS & CMTRA Notes, LC Checklist
			Identify special needs	X	X	Research online, meet with Chaplain, discuss patient's needs	CPRS & CMTRA Notes, LC Checklist
			Receive service	X	X	Ongoing assessments, meeting with patient, exploring patient's views link to VA Chaplains or community resources	CPRS & CMTRA Notes, LC Checklist
			Monitor progress		X	Case Manager monitors all activities through completion or transfer of care	CPRS & CMTRA Notes, LC Checklist
Recurrent	Citizenship (Service member, Veteran, Caregiver, etc.)	Plan goals and activities include, at a minimum: discussing the Citizenship process, determining needs (i.e. SM/V, Caregiver, etc.), identifying support resources, facilitating the completion of steps in the citizenship process, and monitoring progress in each of these areas.	Discuss process	X	X	Comprehensive Assessments, LC Checklist	CPRS & CMTRA Notes, LC Checklist
			Determine need	X	X	Meet with SM/V & family to discuss & verify status	CPRS & CMTRA Notes, LC Checklist
			Identify citizenship support resources	X	X	Phone calls, research on line, link SM/V & family to appropriate community & legal resources	CPRS & CMTRA Notes, LC Checklist
			Facilitate completion of steps/appointments in citizenship process	X	X	Phone calls, research on line, link SM/V & family to appropriate community & legal resources, address barriers to attendance and assist with problem solving these barriers	CPRS & CMTRA Notes, LC Checklist
			Monitor progress		X	Case Manager monitors all activities through completion or transfer of care	CPRS & CMTRA Notes, LC Checklist

Recurrent	Client Death	Assess needs of family, link family with appropriate resources, facilitate arrangements as appropriate, and follow up to ensure family has requires benefits, services and support	Assess need of family	X	X	Comprehensive Assessments, LC Checklist	CPRS & CMTRA Notes, LC Checklist
			Link to appropriate resources	X	X	CPRS & CMTRA Notes, LC Checklist	CPRS & CMTRA Notes, LC Checklist
			Facilitate family's wishes for funeral	X	X	coordinate with funeral homes, national cemeteries or state cemeteries, advocate for	CPRS & CMTRA Notes, LC Checklist
			Facilitate family wishes for burial	X	X	Meet with family, phone calls with military, coordinate with funeral homes, national	CPRS & CMTRA Notes, LC Checklist
			Facilitate appropriate grief/BH referrals	X	X	grief counseling, link to chaplain if needed, research on line for resources in the community & link appropriately	CPRS & CMTRA Notes, LC Checklist
			Follow up with family as indicated	X	X	services, research on line fo additional resources as needed, link to community spiritual resources	CPRS & CMTRA Notes, LC Checklist
			Provide FRC contact information	X	X	Phone call, email if FRC is involved	CPRS & CMTRA Notes, LC Checklist
Recurrent	Command Issues	Help Active Duty Service members as well as Veterans and their families navigate and manage Service and command-specific activities and requirements associated with	Discuss process	X	X	Management notes, Family meetings, IDTs, warm	Checklist
			Determine need/requirements	X	X	phone calls, IDTs	Checklist
			Complete required activities	X	X	Social security etc.)	Checklist
			Monitor progress		X	completion or transfer of care	Checklist
Recurrent	Counseling	Plan goals and activities include, at a minimum: discussing the counseling process, determining need, eXploring appropriate resources, determining pay sources, receiving services, and monitoring progress in each of these areas.	Discuss process	X	X	Management notes, Family meetings, IDTs,	Checklist
			Determine need	X	X	family, IDT's, use of Mental Health Suite, Meeting	Checklist, Mental Health
			Explore appropriate resources	X	X	Phone calls, online research, IDT,	Checklist
			Determine pay source	X	X	Review with MTF CM, phone calls, emails	Consults if needed, CMTRA
			Receive service	X	X	Phone calls, coordinate transportation if needed	Consults if needed, CMTRA
			Monitor progress		X	completion or transfer of care	Checklist
Recurrent	Emergency Financial Relief Resources	Plan goals and activities include, at a minimum: discussing the Emergency Financial Relief Resources process; determining resource needs and eligibility; eXploring options in the community, DoD, and VA; completing applications/paperwork and submitting claims (as necessary); receiving a determination and financial assistance; appealing claims determination; and monitoring progress in each of	Discuss process	X	X	Management notes, Family meetings, IDTs,	Checklist
			Determine emergency financial needs	X	X	family, IDT's, f exploring patients & family needs	Checklist
			Explore community, military, and VA options	X	X	Phone calls, research on line, connecting & linking to VA, military and community resources	CPRS & CMTRA Notes, LC Checklist
			Complete applications/paperwork	X	X	to VA, military, Veteran Service Organizations,	Checklist
			Submit claims	X	X	Community, phone calls, email, letter	Checklist
			Receive claim determination	X	X	vs Community, phone calls, email letter	Checklist
			Receive emergency financial assistance	X	X	resources, assist with application, monitor	Checklist
			Appeal claims determination(if necessary)	X	X	Link to VSO, military FRC, FRC etc., phone calls, email, assist with completing updated/new forms	CPRS & CMTRA Notes, LC Checklist
			Monitor progress		X	completion or transfer of care	Checklist
			Discuss process	X	X	Management notes, Family meetings, IDTs,	Checklist

Recurrent	Emotional Support	Assess needs, identify resources, link to appropriate support and behavioral health, and monitor progress to ensure needs are being met	Determine needs	X	X	Management notes, Family meetings, IDTs,	Checklist
			Link to support group	X	X	Phone calls, online research, IDT,	Checklist
			Link with behavioral health	X	X	needed, Tricare Authorizations	Checklist
			Provide support and guidance	X	X	family/caregiver	Checklist
			Monitor progress		X	completion or transfer of care	Checklist
Recurrent	Family Assistance	Assess needs, identify resources, make referrals to government or non-government resources, and follow up to ensure family needs are being met	Discuss process	X	X	Management notes, Family meetings, IDTs,	Checklist
			Determine needs (i.e. family health care issues, accessibility, etc.)	X	X	Phone calls, comprehensive assessment, case	CPRS & CMTRA Notes, LC
			EXPlore community, military, and VA resources	X	X	Management notes, Family meetings, IDTs, varies as to who notifies about this, military vs VA	CPRS & CMTRA Notes, LC
			Complete requirements	X	X	vs Community, phone calls, email letter	Checklist
			Receive assistance	X	X	resources, assist with application, monitor	Checklist
			Monitor progress		X	resources, assist with application, monitor	Checklist
Recurrent	Other Military Considerations	Plan goals and activities include, at a minimum: discussing the process for other considerations, obtaining family/friend access to military facilities and amenities, reuniting with military units for welcome home/funeral and participating in welcome home celebration, obtaining branch-specific gift letter, and registering for eBenefits.	Discuss process and monitor progress	X	X	Management notes, Family meetings, IDTs, individual meetings/sessions	CPRS & CMTRA Notes, LC Checklist
			Obtain family/friend access to military facilities and amenities	X	X	Primarily a military function, link to Liaisons, MTF CM's RCC, Command etc.	CPRS & CMTRA Notes, LC Checklist
			Reunite with military unit for welcome home/funeral	X	X	Primarily a military function, link to Liaisons, MTF CM's RCC, Command etc.	CPRS & CMTRA Notes, LC Checklist
			Participate in Welcome Home celebration	X	X	Primarily a military function, link to Liaisons, MTF CM's RCC, Command etc.	CPRS & CMTRA Notes, LC Checklist
			Obtain branch specific gift letter	X	X	Primarily a military function, link to Liaisons, MTF CM's RCC, Command etc.	CPRS & CMTRA Notes, LC Checklist
			Register for eBenefits	X	X	Assist patient with completing online	CPRS & CMTRA Notes, LC Checklist
Recurrent	Support Groups	Plan goals and activities include, at a minimum: discussing the support groups process, determining need, eXploring support groups within the community-MTF-VA, receiving services, and monitoring progress in each of these areas.	Discuss process	X	X	Management notes, Family meetings, IDTs,	Checklist
			Determine need	X	X	Management notes, Family meetings, IDTs,	Checklist
			EXPlore groups within community, MTF, and VA	X	X	Phone calls, online research, IDT,	CPRS & CMTRA Notes, LC Checklist
			Receive service	X	X	resources, monitor progress/attendance	Checklist
			Monitor progress		X	completion or transfer of care	Checklist
33		Plan goals and activities include, at a minimum: discussing the Transition to VA Care process, verifying a separation date, verifying a separation date,	Discuss process	X	X	Management notes, Family meetings, IDTs,	Checklist
			Verify separation date	X	X	primarily a Military Function	Checklist
			Link to resources	X	X	CPRS & CMTRA Notes, LC Checklist	Checklist

Recurrent	Transition to VA Care	linking to transition resources, confirming appointments, providing transition support, confirming VHA enrollment, and monitoring progress in each of these areas.	Confirm appointments	X	X	Janus	Checklist
			Provide transition support	X	X	MH, specialty care etc.), link to community	Checklist
			Confirm VHA enrollment	X	X	ensure consults and appointments are in place &	Checklist
			Monitor progress		X	completion or transfer of care	Checklist
Recurrent	Unemployment Compensation	Plan goals and activities include, at a minimum: discussing the Unemployment Compensation process, determining need and eligibility, completing applications, submitting claims, receiving claim determinations, appealing a decision (if applicable), and monitoring progress in each of these areas.	Discuss process	X	X	Management notes, Family meetings, IDTs,	Checklist
			Determine need and eligibility	X	X	Phone calls, email, research internet	Checklist
			Complete applications and paperwork	X	X	applications	Checklist
			Submitting claims	X	X	Phone calls, fax, ensure it's been received	Checklist
			Receive claim determination	X	X	resources, assist with application, monitor	Checklist
			Appeal decision	X	X	email, assist with completing updated/new forms	Checklist
			Monitor progress		X	completion or transfer of care	Checklist
Recurrent	Veteran's Compensation and Pension & VA Claims	Plan goals and activities include, at a minimum: discussing the Veteran's Compensation and Pension – VA Claim process, completing a Compensation Disability Claim, attending all C&P eXaminations, receiving claim determination, appealing a decision (if applicable), and monitoring progress in each of these areas.	Discuss process	X	X	Management notes, Family meetings, IDTs,	Checklist
			Determine needs	X	X	completing forms, online	Checklist
			Complete Compensation Disability Claim	X	X	completion of forms, email, phone calls	Checklist
			Attend all C & P eXaminations	X	X	Phone calls, emails	Checklist
			Receive claim determination	X	X	Phone calls, emails	Checklist
			Appeal decision	X	X	completion of forms, email, phone calls	Checklist
			Monitor progress		X	Case Manager monitors all activities through completion or transfer of care	CPRS & CMTRA Notes, LC Checklist